

DEPARTMENT OF ADMINISTRATIVE SERVICES

Milwaukee County



January 2, 2020

To All Interested Consultants

**Project: DHHS Youth Services Administration
Relocation and Tenant Improvements Facility
Planning and Design**

Project No.: WS12601

Subject: REQUEST FOR PROPOSALS (R.F.P.)

Milwaukee County Department of Administrative Services, Facilities Management Division (DAS-FMD) is requesting proposals for professional consulting services for facility planning and architectural design services to relocate and consolidate DHHS's Youth Services Administration, as part of its System of Care transformation.

I. GENERAL PROJECT DESCRIPTION

The Milwaukee County Department of Health and Human Services (DHHS) is transforming its service delivery method to provide more effective services to the residents of Milwaukee County. One of the strategies driving the transformation is for DHHS to address root causes by providing the right treatment, at the right place, at the right time and in the right way. To accomplish this, DHHS envisions organizing itself across systems of care that will work across the life span of the individual – one for children and their families, and one for adults.

This transformation will not only be a functional reorganization, but also a significant cultural shift that requires a strategic facility plan and execution that aligns with and supports the new service delivery model.

DHHS is also vacating the Milwaukee County Mental Health Complex, located at 9455 W. Watertown Plank Road, Wauwatosa, in large part due to their new partnership with United Health Services (UHS) on in-patient behavioral health treatment at a new hospital to be constructed and operated by UHS. Closure of the Mental Health Complex helps drive timing for this project and will result in the need to relocate some administrative and service resources.

Milwaukee County is also considering strategic plans for other departments. For instance, this project may also provide an opportunity for the Milwaukee County Department on Aging to relocate to a more suitable location, to be able to serve its similar client base.

The scope of this project will address facility planning and architectural design services. Milwaukee County plans to acquire (most likely by way of lease), design and build out space to accommodate the System of Care transformation. DHHS, Aging and DAS-FMD are currently in the strategic facility planning stage, and the Milwaukee County Department of Administrative

Subject: ***Request for Proposals***
Project: **DHHS Youth Services Administration Relocation and Tenant Improvements
Facility Planning and Design**
Project No.: **WS12601**

Services, Economic Development Division (DAS-ED) will be leading real estate search efforts in the near future. The System of Care transformation is currently planned to be a multi-phase project. Phase 1 consists of relocating approximately 85 staff. Phase 2 consists of relocating approximately 316 staff. The goal is to complete the relocations by the third quarter of 2021, to coordinate with the proposed opening and operation of the new UHS hospital.

This System of Care transformation may be best suited by working environments that are considerably different than those at the current facilities, such as by providing a more welcoming space for those seeking services, and by facilitating care coordination between occupying County groups. The planning, design and implementation services to be provided by the consultant selected for this project will need to be sensitive to the challenges related to organizational change management.

Facility scenario planning conducted by County staff to-date have identified the potential need for multiple facilities to serve the defined program requirements, and the potential to re-purpose existing County facilities. Further definition of the required facility footprint is anticipated to be informed by in-depth real estate market research and market conditions. For purposes of preparing a scope of services and fee estimate for this request for proposals, assume that the County will be leasing and building out approximately 65,000 square feet in one facility, and reconfiguring approximately 6,500 square feet in an existing County facility.

II. SCOPE OF CONSULTANT SERVICES

The successful consultant shall provide all services as specified per the standard terms and conditions of the Milwaukee County Department of Administrative Services Consultant Agreement for Professional Services (Type C) (copy will be emailed upon request).

1. GENERAL REQUIREMENTS

The consultant for this project shall:

- manage and administer the services provided, and see that any subconsultants' services are managed appropriately
- consult with the designated County representatives as needed
- attend project meetings, prepare and distribute exhibits and supporting information for meetings as required, prepare and distribute agendas and minutes for each meeting.
- communicate with members of the Project team
- prepare and regularly update a project schedule that will include milestones for decisions to be made by Milwaukee County, work by the consultant and level of completion
- issue written progress reports on a regular basis (not less than every two weeks), providing status updates on scope, schedule, budget, and deliverables, and identifying additional input needed from Milwaukee
- coordinate the work of their team including any subconsultant(s)
- coordinate their work with those services provided by Milwaukee County and Milwaukee County's consultants

The consultant shall include, as part of their contract, subconsultants that will be required based on the project scale, type of facility and specialized functions. These subconsultants, along with their expertise and level of participation, shall be indicated in the consultant's proposal.

Subject: ***Request for Proposals***
Project: **DHHS Youth Services Administration Relocation and Tenant Improvements
Facility Planning and Design**
Project No.: **WS12601**

2. BASIC SERVICES

Task One – Data Collection/Fit Plans

1. Meet with DHHS/Aging leadership to review the space needs program, adjacency preferences, and other pertinent space planning requirements. Assume one meeting.
2. Identify items, areas, proximities, building systems requirements, and special tenant improvement requirements not previously documented.
3. Prepare a final space needs analysis for review and approval by County staff.
4. Conduct walk-throughs of locations being considered for leasing. Assume walk-throughs of five locations.
5. Prepare initial fit plans for a short list of locations to be considered further and provide to County for review and comment. Assume three initial fit plans, one each for three short-listed locations.
6. Provide preliminary building code review for each of the short-listed locations as part of the planning effort.
7. Review initial fit plans with County staff, and revise to incorporate comments. Assume one revision each for each of the short-listed locations.
8. Prepare preliminary estimate of probable costs for build-out of the revised fit plans for each of the three short-listed locations.

Task Two – Architectural and Interior Design Services

1. Field verify existing conditions, including elevations, floor plans and roof plans, and existing MEP locations.
2. Conduct detailed code review of State of Wisconsin and municipal building codes as related to the proposed operations within the space to be occupied.
3. Prepare schematic design of new space for review by County staff.
4. Review schematic design with County staff and make revisions as requested. Assume one set of revisions.
5. Prepare design development level documents of space, including finish specifications such as colors, materials, wall finishes, flooring and ceiling treatment.
6. Coordinate with landlord on MEP requirements (assume design by landlord).
7. Review design with County staff and make revisions as requested. Assume one set of revisions.
8. Prepare final construction documents, including plans, specifications, and bidding documents, in accordance with Milwaukee County standards, for bidding by Milwaukee County.
9. Submit required documentation and fees to municipality for building permit plan review and approval. Meet with municipal staff as required to facilitate building permit approval.
10. Update and provide final estimate of probable construction costs for build-out.

Task Three – Furniture Planning and Selection

1. Coordinate with County space planner on available surplus furniture and parameters for procurement of new furniture.
2. Develop specifications for furniture in collaboration with County space planner.

Subject: **Request for Proposals**
 Project: **DHHS Youth Services Administration Relocation and Tenant Improvements Facility Planning and Design**
 Project No.: **WS12601**

3. Select a minimum of three options for purchase of new furniture.
4. Review options with DHHS/Aging and space planner.
5. Provide detailed list of furniture to be purchased, for County procurement.

Task Four – Bidding and Construction Services

1. Provide original bidding documents (electronic and one hard copy) to the County for distribution.
2. Provide the County with responses as required for bidder questions.
3. Prepare and furnish bid addenda as required.
4. Conduct a pre-bid conference.
5. Review received bids for conformance and make recommendation for award.
6. Review shop drawings and submittals as submitted by contractor.
7. Visit the jobsite at key intervals to review progress and ascertain that construction is proceeding in accordance with the final plans and specifications.
8. Attend weekly job progress meetings with County and contractor.
9. Review and provide recommendations on contractor change orders and pay requests.
10. Maintain construction punchlist throughout construction and prepare punchlist report.
11. Provide recommendations as to substantial completion and final acceptance of the project.
12. Confirm testing and commissioning has been completed and systems/equipment operate properly.

3. QUALITY CONTROL

Milwaukee County reserves the right to request partial or full reimbursement from consultants for change orders resulting from errors and omissions in the services they are contracted to provide.

4. ANTICIPATED PROJECT TIMETABLE

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| 1. | January 2, 2020 | Issue Request for Proposal |
| 2. | January 15, 2020, 11:00 a.m. | Optional Pre-proposal Meeting |
| 3. | January 24, 2020, 2:00 p.m. | Proposals Due |
| 4. | January 31, 2020 | Selection Committee complete review of submitted proposals |
| 5. | Week of February 3, 2020 | Interviews (if necessary) |
| 6. | February 7, 2020 | Selection Committee selects consultant |
| 7. | February 21, 2020 | Consultant award (will occur no sooner than this date) |
| 8. | March 6, 2020 | Offer, negotiate and execute a contract with selected consultant |
| 9. | March 2020 | Project kick-off and data gathering |
| 10. | April 2020-June 2020 | Preparation of fit plans |
| 11. | July 2020 – November 2020 | Preparation of schematic and final plans and specifications |
| 12. | December 2020 – July 2021 | Build-out and furniture procurement |

Subject: ***Request for Proposals***
Project: **DHHS Youth Services Administration Relocation and Tenant Improvements
Facility Planning and Design**
Project No.: **WS12601**

Please note, funding for planning and design is currently sequestered in an allocated contingency. It is anticipated that the County Board will approve use of the allocated contingency at its February 6, 2020 meeting. Award of this project is dependent on the approval by the County Board to use the allocated contingency.

5. PRE-PROPOSAL MEETING

There will be an optional pre-proposal meeting at 11:00 a.m. on Wednesday, January 15, 2020, in the 1st floor conference room of the Clark Building, 633 W. Wisconsin Avenue, Milwaukee. Milwaukee County staff will be on hand to answer questions about the RFP.

III. RELATED WORK BY OTHERS

- A. The County will make available the following files and documents:
1. DHHS and Dept. on Aging space programming data
 2. Floor plans of potential leased locations

IV. PROPOSAL CONTENT

The proposal shall conform to Milwaukee County's Proposal Preparation, Submission and Evaluation Guidelines (see Attachment 1). The proposal shall include the Consultant Proposal Form (see Attachment 2) and the following information:

- A. **Cover:** Include project number and name, project location, consultant's name, address, telephone number, FAX number, e-mail address, proposal date, etc.
- B. **Table of Contents:** Include an identification of the material by section and page number.
- C. **Letter of Transmittal:** The name and description of the organization submitting the proposal briefly stating the proposer's understanding of the service to be provided.
- D. **Organization's Experience:** Include a list of similar projects that the organization has participated on in the past five (5) years. Attach a separate sheet for each project, up to five (5) maximum, giving a brief description of each project and the organization's participation.
- E. **Project Organization and Staff Experience:** Include an organizational structure of the project team, including the relationship of the subconsultants to be used for this project. The name of the Principal in Charge of this project must be clearly indicated in this section of the proposal, along with the name, occupation and title of the Project Manager who will be in charge of this project. Provide a resumé for each individual involved in the project, and include their name, title and/or duties for the project, professional registration, relevant certifications, a brief description of related experience including time contribution in this capacity to past projects, and qualifications.
- F. **Subconsultants:** Indicate the names and addresses of any subconsultants and/or associates proposed to be used in this project. State the capacity they would be used in and the approximate percentage of the total services they would provide. Also state their past experience in the field.

Subject: ***Request for Proposals***
Project: **DHHS Youth Services Administration Relocation and Tenant Improvements
Facility Planning and Design**
Project No.: **WS12601**

- G. Project Approach:** Provide a description of real estate and strategic facility planning, problems you anticipate in this project and how you propose to overcome them. Discuss how you plan to staff the project to efficiently complete the work effort.
- H. Scheduling:** Base proposal on schedule provided in this RFP.
- I. Constant Effort:** Include a spreadsheet/matrix listing the names, classifications, hourly rates and hours to be spent by each required task to complete the project as described in this RFP.
- J. Quality Control:** Submit a contract document quality control plan. Quality control is to be performed by individuals not assigned to the project on an ongoing basis.
- K. Fee Proposal:** The fee for this project shall be clearly stated as an actual cost not-to-exceed fee for these services. A dollar amount for reimbursable items as described in the proposal should also be clearly stated.

V. PROPOSAL EVALUATION

See the attached Milwaukee County Proposal Preparation, Submission and Evaluation Guidelines for the evaluation criteria. Proposers must recognize this is not a bid procedure, and a Professional Services agreement will not be awarded solely on the basis of the low fee proposal. Milwaukee County reserves the right to accept or reject any and all proposals, issue addenda, request clarification, waive technicalities, alter the nature and/or scope of the proposed project, request additional submittals, and/or discontinue this process.

VI. GENERAL REQUIREMENTS

A. TARGETED BUSINESS ENTERPRISE (TBE) REQUIREMENTS

Community Business Development Partners (CBDP) is responsible for monitoring and enforcing the Milwaukee County Targeted Enterprise (MCTE) Ordinance for inclusion of small business. Target firms include DBE firms certified under the Wisconsin Unified Certification Program following Federal regulations, WBE and MBE certifications from the State of Wisconsin DOA, SBE firms certified by Milwaukee County, and SBE firms meeting SBA size standards and listed in the SAM directory.

Targeted Business Enterprise (TBE) participation goal for this RFP is 17%. To be considered for this project, you must submit a *Subcontractor/Sub-consultant/Supplier Information Sheet* (TBE-02) with your Proposal listing all sub-consultants as well as signed *Commitment to Contract with TBE* (TBE-14) forms, one for each of the TBE firms included to meet participation. TBE-14 form(s) must identify (1) the TBE firm by name and address, (2) the scope of service(s) to be provided, (3) the dollar amount and (4) the percentage. The form is first completed and signed by the Prime, then forwarded to the TBE subconsultant for signature in the affirmation section. Signatures must occur in the proper date order sequence, or the form may be considered non-responsive. CBDP is entitled to reject your Proposal for improperly completed forms. If you are not able to

Subject: ***Request for Proposals***
Project: **DHHS Youth Services Administration Relocation and Tenant Improvements
Facility Planning and Design**
Project No.: **WS12601**

meet the goal, you must submit the *Certificate of Good Faith Efforts* (TBE-01) for your proposal to be considered responsive.

CBDP may be contacted at 414-278-4851 or cbdpcompliance@milwaukeecountywi.gov for assistance in identifying TBE firms and understanding the County's TBE Program.

Following are the links to Directories for firms eligible for credit:

DBE <http://wisconsindot.gov/Pages/doing-bus/civil-rights/dbe/certified-firms.aspx>

MBE WBE <http://www.doa.state.wi.us/Divisions/Enterprise-Operations/Supplier-Diversity-Program>

Milwaukee County SBE <https://mke.diversitycompliance.com/Default.aspx>

SAM Directory for Federal SBE <https://www.sam.gov/portal/SAM#1>

Adherence with prompt payment requirements is monitored through information entered into the Diversity Management and Compliance System, utilizing B2GNow software. Prime consultants are required to report payments received from the County and amounts paid to subconsultants. Subs will receive an automated email requesting them to confirm the amounts and whether the terms of the prompt payment policy were complied with. There is no cost to the Prime or any subconsultant, the only requirement is to become a registered user and complete the one hour webinar training. The County will enter the Prime's contract, and the Prime will enter all subconsultants, including both TBE and non-TBE firms.

The Targeted Business Enterprise (TBE) Utilization Specifications and forms to be used are included in the RFP (Attachment 3).

- B. Selected Consultant shall follow Milwaukee County Code of Ethics as follows: No person(s) with a personal financial interest in the approval or denial of a Contract being considered by a County department or with an agency funded and regulated by a County department, may make a campaign contribution to any County official who has approval authority over that Contract during its consideration. Contract consideration shall begin when a Contract is submitted directly to a County department or to an agency until the Contract has reached final disposition, including adoption, County Executive action, proceeding on veto (if necessary) or departmental approval.
- C. Communication initiated by a proposer to any County official, employee or representative evaluating or considering to proposals, prior to the time of any award is prohibited unless at the explicit direction of the RFP Contact/Project Manager and any such unauthorized communication may constitute grounds for rejection or elimination of a proposal from further consideration, in the sole discretion of the County.
- D. The successful consultant must be an Equal Opportunity Employer.

Subject: **Request for Proposals**
Project: **DHHS Youth Services Administration Relocation and Tenant Improvements Facility Planning and Design**
Project No.: **WS12601**

- E.** The proposal shall conform to all attached documents. All proposals should use this RFP and its attachments as the sole basis for the proposal. The issuance of a written addendum is the only official method through which interpretation, clarification or additional information will be given.
- F.** All costs for preparing a proposal, attending the selection interview if required, or supplying additional information requested by Milwaukee County, is the sole responsibility of the submitting party. Material submitted will not be returned.
- G.** The proposal must be submitted in a single bound 8-1/2" x 11" document.
- H.** With the signing and submission of a statement or proposal the submitting consultant certifies that the standard terms and conditions of the Agreement for Professional Services (that will be used to contract with the selected consultant) has been read and understood and that the submitting consultant is ready, willing and able to sign the agreement when requested without making any substantive changes.

Please provide **five (5)** paper copies and one pdf version of your proposal no later than **2:00 P.M. on January 24, 2020** to **Peter Nilles** Project Manager, Milwaukee County Department of Administrative Services, Facilities Management Division, 633 W. Wisconsin Avenue, Suite 1000, Milwaukee, Wisconsin, 53203 (Telephone (414) 278-4953, email peter.nilles@milwaukeecountywi.gov).

Please direct questions regarding this RFP to me using the contact information provided above.

Sincerely,



Peter Nilles
Director, Facilities Planning and Development

Attachments:

- 1) Proposal Preparation, Submission and Evaluation Guidelines (5 pages)
- 2) Consultant Proposal Form (2 pages)
- 3) Targeted Business Enterprise (TBE) Instructions & Forms (9 pages)

cc: G. High, DAS-FMD W. Banach, DAS-FMD
Stu Carron, DAS-FMD